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ABSTRACT

This general review of the relative merits of social promotion and retention examines research on the benefits of each, describes current strategies for resolving the policy dilemma involved, and considers issues raised by abolishing social promotion and establishing remedial programs. A summary of the history of the widespread adoption of the social promotion policy precedes a literature review outlining arguments against both social promotion and retention. The review then describes studies indicating that retention appears to have a beneficial effect on elementary school students and that the self-concepts of promoted and retained elementary students are virtually the same. Some new approaches to the problem are offered in the following section, which presents guidelines for selecting children for retention, lists strategies for individualizing instruction, describes one widely publicized example of a district that abolished social promotion and reorganized its schools, and reports the experience of a teacher who decided not to follow her school's social promotion policy. A final section considers competency based education, financial concerns, and legal implications. The paper concludes that while competency testing and remedial programs are expensive and often controversial, schools appear to feel that they are serving students better through such policies. A bibliography is appended. (Author/MJL)

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THE LITERATURE ON SOCIAL PROMOTION VERSUS RETENTION

EA 016 712

THE LITERATURE ON
SOCIAL PROMOTION VERSUS RETENTION

SOUTHWEST EDUCATIONAL DEVELOPMENT LABORATORY
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FOREWORD

The SEDL Regional Exchange (SEDL/RX) Project provides information and technical assistance services to educators in six states: Arkansas, Louisiana, Mississippi, New Mexico, Oklahoma, and Texas. It is one of eight Regional Exchanges in the nation-wide Research and Development Exchange (RDx), funded by the National Institute of Education. A major goal of the RDx is the dissemination of information about educational research and development (R&D), with the ultimate aim of contributing to school improvement.

"The Literature on Social Promotion Versus Retention" represents a knowledge synthesis product developed by the SEDL/RX to provide its clients with up-to-date information based on recent literature on this timely subject.

The Southwest Educational Development Laboratory is pleased to be able to serve educators in its region through projects such as the SEDL Regional Exchange.

James H. Perry
Executive Director
Southwest Educational Development
Laboratory

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During the Spring of 1981, the Regional Exchange at Southwest Educational Development Laboratory (SEDL/RX) polled the members of its Advisory Board (which represents the state departments of education in Arkansas, Louisiana, Mississippi, New Mexico, Oklahoma, and Texas) asking them tc rank a series of current educational topics. The purpose of this request was to determine an appropriate topic for a literature review. Social promotion versus retention was a top-ranked issue.

The SEDL/RX would like to express its appreciation to those who reviewed "The Literature on Social Promotion Versus Retention" during its draft stages: Karen Carsrud, Title I Evaluator for the office of Research and Evaluation, Austin Independent School District; Gonzalo Garza, Superintendent, San Marcos Consolidated Independent School District; and Dorothy J. Porter, Director of the State of Colorado's Civil Rights Division.

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Martha Hartzog, Technical Writer for the SEDL/RX, was primarily responsible for preparing the document. Nancy Baker Jones, Senior Dissemination Specialist, and Anna Penn Hundley, Dissemination Specialist for the project assisted by gathering the literature and reviewing the draft; and Barbara L. Baylor, Senior Secretary, prepared the final copy.

Preston C. Kronkosky
Deputy Executive Director
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THE ADOPTION OF THE SOCIAL PROMOTION POLICY

Social promotion--passing children to the next grade even though they have not mastered the curriculum--began to be widely adopted in this country during the 1950s. The practice apprarently reached its zenith in the 1970s, some 1977 estimates placing the number of school districts practicing it at 14,000, or about 90% of all school districts in the county ("When Students . . . ," p. 1).

To understand how social promotion became so widely established, it is necessary to return to the beginnings of our public school system. When the country was founded in 1776, an educated citizenry was thought to be essential to a democracy, and the United States was unique among nations in providing a free public education. However,

> The belief in mass education was not founded primarily upon a passion for the development of mind, or upon pride in learning and culture for their own sakes, but rather upon the supposed political and economic benefits of education.
>
> (Hofstadter, p. 305)

In the United States, the practical benefits of an education have always been stressed. From the beginning we deliberately set ourselves apart from the "Old World" ideals of elitism, the superiority of the aristocracy, the elevation of learning for learning's sake. We prided ourselves on being egalitarian, practical, and moralistic, and we expected our educational system to reflect this philosophy. It has done so.

During the late 18th and mid-19th centuries, the public school system only extended through the primary grades and with few exceptions

was open only to free, usually whites, males. Most students graduated and joined the adult world of work after eight years of schooling. High schools were viewed as strictly preparatory for college and university work and most were private institutions. By the 1870s, however, free public education began to be extended to the secondary level, a natural extension of the democratic ideal of education for everyone.

By the late 19th century, two contrasting views of the purpose of a high school education began to be debated by educators. The "traditional" point of view held that the purpose of a high school education was to "discipline and develop the minds of its pupils through the study of academic subject matter" (Hofstadter, p. 329). This was based on the belief that the same education prepared a student both for college and for life, and involved a rigorous curriculum of four years of English, four years of of foreign language, three years of history, three years of mathematics, and three years of science.

The "progressive" view held that a high school should prepare students to be good citizens, to have a vocation, and to develop their special gifts. It directly reflected the egalitarian, practical philosophy of our nation, and called for such life skill courses as home economics, family life, and vocational education--courses particularly useful to the average or below average student.

By the 1920s free public secondary education was widespread and all children were required to attend school through age sixteen. When this became the case, the nature of the high schools had to change. Many of the students were there relunctantly; they exhibited varying goals and capabilities; many had no interest in preparing themselves for college. The problem of what kind of education would best suit all the children had to be faced, and educators began to make changes which focused on the individual differences of students: ability grouping

and remedial programs were established within the graded system (Cunningham and Owens, p. 26). Educators began to worry also about the high rate of students retained in each grade.

At about the same time, the "progressive" view of education became dominant in the nation's teachers' colleges and professional education associations (Ravitch, "The Schools We Deserve," p. 24). General intellectual discipline as the goal of secondary education was abandoned, and the high school curriculum changed dramatically. For example, in 1893, the average high school curriculum consisted of about 26 subjects; while by 1941, there were 274 subjects being taught, only 59 of which could be considered academic (Hofstadter, p. 342).

The policy of social promotion began to be practiced, on the grounds that failing a child did not help the child academically, damaged the child's self-concept, and discriminated against the average, below average, and unwilling student. The policy spread, until it was widely adopted during the 1950s. The egalitarian motivation of the 1960s increased the pressure on the high schools not to have such high standards that students would drop out ("When Students . . . ," p. 2).

As the 1980s get under way, social promotion is being seriously questioned. It has been cited as one cause of the national decline in Scholastic Aptitude Test scores since 1965 and of the devaluation of the high school diploma (Ravitch, "The schools We Deserve," p. 24). Many schools are rethinking their social promotion policies and are reinstating a form of retention, which is often part of a larger, competency-based program. These changes are seen as ways to upgrade the quality of our public schools.

This paper, while not exhaustive, examines what research actually says about the benefits of social promotion and of retention,

describes some current strategies used to solve this policy dilemma, and takes a quick look at competency-based education, as well as the legal and financial cost involved in abolishing social promotion and setting up remedial programs. A bibliography appears at the end for those who wish to read further.

WHAT THE LITERATURE SAYS

Arguments Pro and Con

Similar arguments are voiced on both sides of the social promotion versus retention issue. Educators who favor grade retention usually claim that it remedies inadequate academic progress and aids in the development of students judged to be emotionally immature (Jackson, p. 614). Educators who favor social promotion also base their arguments on these two reasons, citing benefits to the emotional development of students and to their academic progress.

Claims which sound the same are also made against the two practices. For example, it is stated that both social promotion and retention have the effect of lowering academic standards and that both unfairly place the burden of learning on the student, when it may be the fault of the educational system that the child is not progressing satisfactorily. (A similar claim is made against minimum competency testing.) Opponents of retention state that certain categories of students--some minorities, the handicapped, etc.--are unfairly penalized by the practice; while opponents of social promotion insist that not requiring mastery of certain skills results in students being graduated without the skills necessary for a successful life and that this hurts some minorities the most. The following summarizes the arguments, first against retention, then against social promotion.

ARGUMENTS AGAINST RETENTION

- Grade repetition fails to help the majority of pupils academically.
- Retention damages pupil's self-concept, which in turn further damages achievement.

- Retention and delinquency are linked.
- Retention unfairly penalizes minorities, the handicapped, etc.
- Large numbers of retained students in a class tend to lower the work standards of the whole class.
- Grouping low achievers together leads to uniform treatment and deprives them of the stimulation of more capable students.
- Retention does not significantly reduce the range of individual abilities in a classroom which teachers must handle.

(Reiter, pp. 7-10)

ARGUMENTS AGAINST SOCIAL PROMOTION

- Social promotion unfairly penalizes some groups by not requiring them to master certain skills in order to graduate.
- Social promotion gives students a false sense of ability.
- Social promotion removes the incentives to learn for all students.
- Socially promoted students tend to remain maladjusted and at the bottom of the class scholastically.
- When students are expected to try to do something they are not ready for, it causes emotional blocking and apathy.
- Teachers may feel less than accountable for the performance of pupils who they know will be promoted no matter what.
- Socially promoted pupils have shown a greater tendency to feel inadequate, to cheat, to be unhappy about low marks, and to feel unwanted at home.
- Students need to learn to deal with defeat and to learn what they are able to do and unable to do.
- Social promotion lowers all standards in the evaluation of pupils' achievement.
- Social promotion does not eliminate the student's dissatisfaction, truancy, and dropping out.
- The problems of socially promoted students simply magnify each year until the students drop out.
- Socially promoted students often disrupt the classroom and keep the other students from learning.
- Social promotion places the burden of educational failure on the child alone.

(Reiter, pp. 7-10; "When Students . . . ," p. 4)

Below is a list illustrating the points of similarity on both sides of the issue.

SIMILAR ARGUMENTS MADE
AGAINST BOTH RETENTION & SOCIAL PROMOTION

- Fails to help students academically.
- Damages self-concept of students.
- Lowers academic standards in the school.
- Penalizes certain groups.
- Places unfair burden on teachers.
- Results in increased discipline problems.
- Places unfair burden on students to learn by themselves.
- Linked with truancy, delinquency, drop-out rates.

Although social promotion has been favored over retention for the last three decades, it is clear at this point that some problems resulting from retention remain uncured by social promotion; while other problems are simply replaced by a different set of difficulties. It may be that the failure of either policy to gain permanent acceptance can be attributed to the individual differences that exist among pupils (Reiter, pp. 10-13).

Some educators believe that schools must make a decision between two points of view: (1) that all children can learn and that schools can find the key and (2) that some children cannot be reached and the consequences must be accepted ("When Students . . . ," p. 5).

Findings of Research Studies

The problem with reading the arguments on both sides of the social promotion versus retention issue is that apparently most research studies on the effects of either policy have been poorly designed, and provide, at best, mixed or inconclusive results. In other words, educators have been setting policy without evidence to back it up.

In 1975, Gregg B. Jackson, then with the United States Commission on Civil Rights, published the results of an examination of 44 research studies on the issue, dating from 1911 to 1973. Jackson's purpose was

> to determine, as well as possible from currently available research results, whether students who are doing poor academic work or who manifest emotional or social maladjustment in school are generally likely to benefit more from being retained in a grade than from being promoted to the next one.
>
> (Jackson, p. 615)

Jackson classified the 44 studies into three types, according to design. The most common type, and the one used to prove that social promotion is preferable, studied students retained under normal school policies, comparing them to students who were promoted, also under normal policies. The second type of research study, and the one used to prove that retention is preferable, studied the condition of retained students after promotion, compared with their condition prior to promotion. The least common approach, and the most valuable one according to Jackson, compared pupils with difficulties who have been experimentally assigned to promotion or to retention. The table on the next page describes the three types of research studies.

THREE TYPES OF RESEARCH STUDIES

	Description	Bias	Number Found
Type 1.	Compared students retained under normal school policies with student promoted under normal school policies.	Favors social promotion	16
Type 2.	Compared condition of retained students after promotion with their condition prior to promotion.	Favors retention	12
Type 3.	Compared pupils with difficulties who have been promoted with pupils with difficulties who have been retained.	None	3

The first type of study is biased toward social promotion because "it compares retained students who are having difficulties with promoted students who usually are not having as severe difficulties, as evidenced by the fact that they have not been retained" (Jackson, p. 619). The second type is biased toward retention because other causes that might influence pupil outcomes, such as "natural regeneration from a temporary decline," normal growth and maturation, or regression effects, are not taken into account (Jackson, p. 623).

The third type of study is potentially of great value, according to Jackson, since it can "provide a reliable test of the relative effects of grade retention and promotion on low-achieving or maladjusted pupils" (Jackson, p. 624). Unfortunately, results reported in the type three studies are mixed, ranging from no difference to only some difference between retained and promoted pupils. The results merely suggest that retention is no more productive than promotion. And none of the Type 3 studies are adequate for making generalizations because of their age (the most recent one is over 30 years old), the fact that they fail to "include representative

samples of our nation's schools and students," and the fact that they fail to investigate long-range effects (Jackson, p. 624).

Jackson points out four weaknesses common to all 44 studies. These are reproduced below and are especially interesting because over and over again in the literature, the studies cited to prove either social promotion or retention, depending upon the author's point of view, were cited in Jackson's study and thus exhibit one or more of these four weaknesses.

FOUR WEAKNESSES OF RESEARCH STUDIES

Failure to;

1. sample from a population large and diverse enough to allow broad generalization of findings;
2. define carefully the treatments, since many different things can happen to children and treatments are likely to have different effects;
3. investigate interaction effects between treatments, general characteristics of subjects, conditions for which subjects were considered for grade retention, and school characteristics;
4. investigate long-term as well as short-term effects.

(Jackson, p. 628)

Jackson concludes that "there is no reliable body of evidence to indicate that grade retention is more beneficial than grade promotion for students with serious academic or adjustment difficulties" and calls for soundly designed research studies to be undertaken (Jackson, p. 627).

The Indian River County Study

Among recent studies comparing the relative effects of social promotion and retention is one reported by Jackson K. McAfee at the 1981 meeting of the American Educational Research Association. The study, which took place in the School District of Indian River County, Florida, examined normal curve equivalent gains over a one-year period of three groups of students in grades 1-9: group 1 represented students who had been retained at the end of the first year; group 2 was comprised of students in a compensatory education program who were promoted after the first year; while group 3 represented students who were promoted at the end of the first year.

While the Indian River Study suffers from some of the same methodological problems as those Gregg found in earlier studies, the analysis of data has some interesting results. McAfee found that (1) retention appeared to have a beneficial effect on students in the elementary grades; (2) it had no significant effect in the middle-secondary grades; and (3) in all grades, students in compensatory education groups showed as large or larger gains than in other groups (McAfee, 1981).

McAfee also observes that the issue of social promotion is one of immense complexity, not only in terms of how the instructional program is organized, but also how the progress of students is measured. McAfee points out that the objective determination of whether or not students have mastered certain skills at each grade level rests on skills which have been subjectively determined (McAfee, p. 21). McAfee says that if student progress over time is to be accurately gauged, test publishers need to develop age norms for achievement tests, just as they have done for aptitude tests. These issues have also been raised in the debate over minimum competency education.

A Study of the Effect of Retention on the Self-Concept

The key role played by the self-concept in both retention and promotion is apparent in the arguments both pro and con. In 1977, Harry J. Finlayson reported the results of a study he conducted of the effect of retention on self-concept development at the elementary level.

Finlayson compared pupils who had been promoted with those who had been retained, including what he calls "borderline cases," pupils who were experiencing difficulties similar to the retained students, but who were promoted anyway on the basis of teacher judgment and mental ability. Thus his basic design corresponds to Gregg Jackson's third type.

The students were followed through two school years, 1973-74 and 1974-75. The FACES Scale, developed by Jack R. Frymier at Ohio State University, was administered to the pupils on four separate occasions. The Scale contains 18 questions about feelings toward family, school, friends, and self. The first year sample included the first grade pupils in two suburban school districts who had not been previously held back. The second year sample, from the same schools, included three groups of students: (1) retained, (2) borderline, and (3) promoted. The ultimate question Finlayson posed was "whether a poor self-concept contributes to school failure or whether school failure contributes to a poor self-concept" (Finlayson, p. 205). It is the old "chicken and egg" dilemma.

Finlayson believed that the only valid way to attack this problem was to study children before they have failed and then follow their self-concept development after they failed. He predicted at the outset that the self-concept of the promoted and borderline (also promoted) groups would remain stable over the two years; while the retained group would remain

stable during the first year (before they were retained), and then would become significantly lower than the self-concepts of the ones who had been promoted.

The results of Finlayson's study did not corroborate his predictions and in fact overturned some of the assumptions that have been made over the years about the effect of retention on the self-concept of pupils, at least at the elementary level. Finlayson found that "after nonpromotion, the nonpromoted group of pupils continued to increase their self-concept scores significantly, while scores of the borderline and promoted groups dropped slightly, but not significantly, during the second year of the study" (Finlayson, p. 206). At the fourth and final measurement, the self-concept scores of the promoted and retained groups were virtually the same! See Figure 1, reproduced from Finlayson's report.

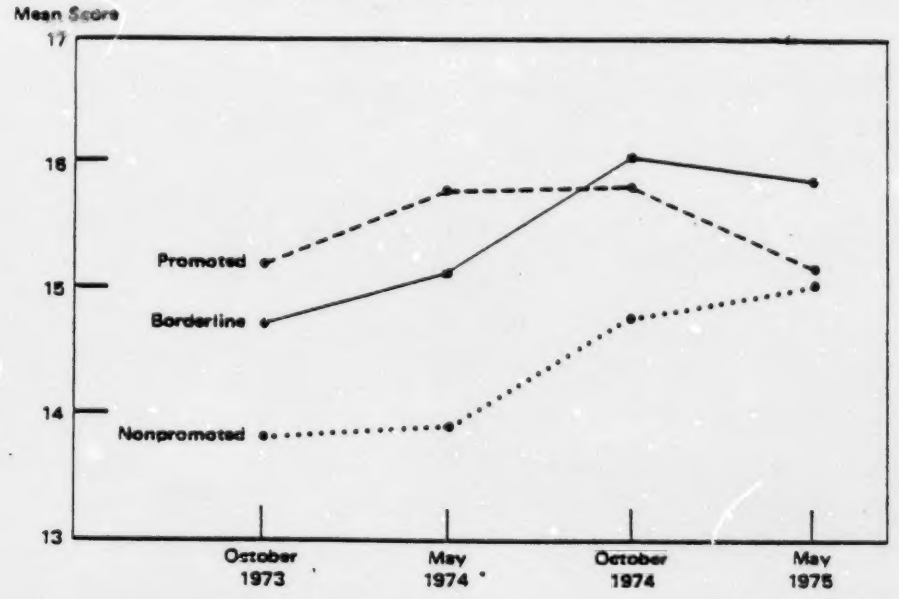


Figure 1. Interaction of Self-Concept Scores for the Three Promotion Groups over a Two-Year Period

(from Harry J. Finlayson's "Nonpromotion and Self-Concept Development." Phi Delta Kappan, Vol. 59, No. 3 [November 1977], p. 206.)

Finlayson offers as a possible explanation of his findings the fact that the self-concepts of promoted pupils may become less positive as they progress through the primary grades. He reasons that as the promoted students interact with their environment more, they develop a more realistic self-image than they had earlier. The retained pupils, on the other hand, gained in self-concept, perhaps because they felt more competent within a more familiar environment (Finlayson, p. 206).

Finlayson supplemented his FACES Scale data by interviewing both parents and teachers of the retained children. He asked the teachers about their perceptions of the children's self-concepts; and he asked the parents how the children reacted to school, how the retention affected them in general, and how the parents felt about the retention policy. Teachers did not report a negative effect on the self-concepts of most of the retained children; and most of the parents reported positive results in their children (Finlayson, p. 206). Even if more research is needed, certainly Finlayson's study calls into question many of the assumptions educators have been making about the effects of retention on the self-concept of children in the primary grades and the attitudes of parents as well.

Schools Can Make A Difference

In 1973, Robert Reiter's review of the literature for the Philadelphia School District (The Promotion/Retention Dilemma: What Research Tells Us, 1973) caused him to conclude that, rather than adopting a single policy to be applied to all children, schools must consider what is best for the individual child. Reiter reminds us that it is the teachers rather than the policy makers who play the key role in a child's education, for they are the ones who can make sure there is a "creative provision of appropriate learning tasks in which the individual pupil can experience success" (Reiter, p. 3).

Reiter also reminds us that academic deficiencies stem from different causes--for example, inadequate earlier instruction, poor study habits, dislike of a subject, general slowness in learning--and different causes require different strategies for remediation (Reiter, p. 3).

Reiter reiterates a theme familiar to recent educational literature--the overwhelmingly strong influence of the home, family and demographic variables on the way pupils perform in school (Reiter, p. 12). The feeling that such variables as race, culture, and socio-economic status are practically insurmountable obstacles for the school to overcome has infused much of educational writing and thinking in the last decade. It has been used not only to explain why certain minorities do less well as a whole than other students, but also why certain innovative programs in education have apparently failed to have any effect on children's learning. This attitude has been attributed to sociologist James Coleman's report of 1966, Equality of Educational Opportunity, whose findings suggested that schools don't make a difference and that family background has the most influence on a child's achievement. It should be noted that Coleman's methodology has been called into question on several counts. For example, his conclusions were based on data from large cities where school desegregation had never been ordered (Taylor, p. 14).

Now, in 1981, a new report by Coleman is out. "Public and Private Schools" is part of a major longitudinal study titled High School and Beyond, which was commissioned by the National Center for Education Statistics. And while many educators have criticized its highly publicized findings that private schools are doing a better job of educating children than are public schools, there is a positive message contained in the report which is contrary to the 1966 report. The 1981 report suggests that schools do make a difference.

Coleman found that in Catholic schools the "achievement levels of students from different parental educational backgrounds of black and white students, and of Hispanic and non-Hispanic white students are more nearly alike in Catholic schools than in public schools" (Ravitch, "The Meaning . . ." p. 719). It is the way students are treated, not their family backgrounds, that determines achievement. The following school factors are described by the Coleman report as apparently resulting in academic success: (1) hign rates of engagement in academic activities (time on task), (2) more homework, (3) more rigorous subjects, (4) the effectiveness and fairness of discipline, and (5) the degree of teacher involvement in students (Ravitch, "The Meaning . . . ," p. 719).

Ronald Edmonds, a Harvard University education professor, also found in his research that effective schools, wherever they are located, have certain characteristics that set them apart from ineffective schools: (1) the principal takes a strong, effective leadership role in the area of instruction; (2) both principals and teachers have high expectations for their students; (3) the schools tend to be orderly without being rigid; and (4) pupils' progress is frequently monitored (Savage, p. 22).

Coleman's and Edmonds' conclusions are consonant with Reiter's three keys to maximum learning for each student: (1) the school's atmosphere; (2) the instructional practices in each classroom; and (3) the interaction between the teacher and the pupil (Reiter, p. 14).

Schools today are taking a new look at the social promotion versus retention controversy. Educators realize that merely eliminating social promotion and retaining failing students will not work. Special programs must be provided so that failing students will not simply be cycled through programs that did not work for them the first time and great care must be taken in selecting which students to retain, which to promote (Cunningham and Owens, p. 29). The next section describes some of the new approaches schools are taking.

SOME NEW APPROACHES

Of course educators realize that simply abolishing social promotion will not solve any problems. Solutions are occurring, in fact, at several levels in the educational system and with varying degrees of comprehensiveness. At some schools individualized remediation strategies are being adopted for particular pupils; in other instances, school districts are deciding to implement a selective retention/promotion policy, based perhaps on a competency-based program. The latter option has the potential for a wide variety of configurations.

The following describes guidelines to use when selecting which child to retain; lists some single strategies for individualizing instruction or otherwise approaching the promotion-retention issue; describes four models of "retention" found in four school districts in the nation; describes one widely publicized example of a district which abolished social promotion and reorganized its schools; and, finally, reports the experiences of a single teacher who decided on her own not to adhere to the school's social promotion policy.

In the examples given, different strategies and programs are used for primary and for secondary grades, based upon the social-emotional maturity and remediation requirements of the students. The examples illustrate the importance of realizing that it takes time to implement a change in the educational system and also illustrates the strength and variety of the nation's educational system, with its ideal of local control.

Selecting the Child to Retain

When making a decision about promoting or retaining a child, factors pertaining to the child, to the family, and to the school must be taken

into consideration. For the most part these relate to attitudes, to available resources, and to the reason for the retention itself. Each factor listed below can be used to argue for or against a particular retention, and it is the social, emotional, and mental development and school history of the individual child which determines how each of the factors ought to be rated.

FACTORS AFFECTING DECISIONS ABOUT PROMOTION OR RETENTION

Child Factors

- physical disabilities
- physical size
- academic potential
- pychosocial maturity
- neurological maturity
- self-concept
- ability to function independently
- grade placement (when is it appropriate to retain?)
- chronological age
- previous retentions
- nature of the problem (behavior or learning rate as basis for retention)
- sex
- chronic absenteeism
- basic skill competencies
- peer pressure
- child's attitude toward retention

Family Factors

- geographical moves
- foreign language immigrants
- attitude toward retention (personal history of retention; cultural attitudes; pressure from friends, neighbors and relatives)
- age of siblings and sibling pressure
- involvement of family physician

School Factors

- system's attitude toward retention
- principal's attitude toward retention
- teacher's attitude toward retention
- availability of special education services
- availability of other programmatic options
- availability of personnel

(Lieberman, pp. 40-44)

Single Strategies to Implement

In reviewing the literature of social promotion versus retention, Robert Reiter, whose emphasis is on the attention the individual child should receive rather than on policy, found the strategies listed on the next page to be used in schools or to be recommended by educators.

SINGLE STRATEGIES

FOR SOLVING SOCIAL PROMOTION VS RETENTION

- Offer individualized education plans, individualized instruction, diagnostic and prescriptive teaching: all based on the idea of success in small tasks, building up to more difficult tasks;
- Establish close communication between school and home in order to communicate the idea that promotion and retention are not rewards and punishments but placements intended to maximize learning;
- Change the retained child's teacher, or make sure the same teacher doesn't appear to have lost faith or to be using unsuccessful strategies;
- Set minimum standards for each grade level, but don't apply them to pupils two years behind age mates; then provide students with individualized instruction;
- Provide counseling by school counselors to help pupils set realistic academic and career goals;
- Set up flexible scheduling, to allow marginal students to take some subjects of interest to them;
- Establish alternative programs for slow learners, apart from regular curriculum;
- Reduce compulsory attendance to age 14 (suggested by the National Commission on the Reform of Secondary Education in 1973);
- Abolish grades at the primary level; de-emphasize promotion (the McKinley School Project, Warren, Ohio, combines non-grading with team teaching);
- Apply standardized tests earlier in the year so teachers can use results;
- Replace the high school diploma with an "exit certificate" which indicates the specific level of academic proficiency attained;
- Group retained students with other over-age students.

(Reiter, pp. 14-19)

A recent study by Bobby J. Woodruff, "Two Tennessee Studies of Kindergarten Relationships to Grade Retention and Basic Skills Achievement" (1980), found that attending kindergarten significantly lowered the rate of retention for children (Woodruff, p. 13).

Four "Retention" Models

The four models described are from Margery Thompson's "Social Promotion: Going, Going . . . Gone?" (The American School Board Journal, January 1979). Additional examples can be found in the Phi Delta Kappan's special issue on the miminum competency movement (May 1978), and in other literature on the subject. Some of the single strategies reported by Reiter can be found in the four models described below.

1. Local Option

Subdistricts in the Chicago Public School System established minimum performance standards in 1976 which gradually were adopted throughout the city's schools. These standards were not mandated by the state.

- Standards for high school graduates were set first: passing a basic skills proficiency test was required;
- Promotion policy for elementary schools was set next: students had to pass 80% of key objectives in language arts at certain grade levels; one year of remedial work possible.

2. "Placement" Policy

In Wake County, North Carolina, schools set a placement policy which differentiated between middle schools and high schools.

- At the middle school level, socially and physically mature students are not retained with very immature students;
- High school students are grouped by ability into basic, average and honors groups; students are not frozen into these groups however, and can move from one to another.

3. Remediation Model

Denver, Colorado, students have to pass proficiency tests in mathematics, spelling, language arts, and reading before they are graduated. This has been the case since 1962. During the 1977-78 school year, similar requirements were set for grades 7-9, and in 1979, minimum skill levels were required in all elementary grades for promotion.

The Colorado State Department of Education requires that if such standards are set, schools must undertake the following:

- Give tests twice a year, beginning in the 9th grade;
- Provide instruction based on test results;
- Provide remedial and tutorial services during the day until the students are able to pass the examinations;
- Provide tutorials with special teachers and institute peer tutoring.

4. Selected Retention

Caroline County, Maryland, practices selected retention according to grade groupings. The State Department of Education has set minimum progressive reading levels for promotion from grades 2-12, with tests given at grades 3, 7, 9, and 11; 1982 graduating classes will be required to show a functional reading ability.

- K-3: can hold back one year;
- 4-6: can hold back one year, with remedial programs provided.

(Thompson, pp. 30-32)

The Example of Greensville, Virginia

Much is made in the literature, both pro and con, about the Greensville, Virginia, approach to retention. It is a significant example and deserves to be described in detail. In 1973, the Greensville school board decided to change its policy toward social promotion. Thereafter, students would be promoted "only if they pass standardized achievement tests given twice a year" ("When Schools . . . ," p. 5). No longer would children be promoted on social grounds.

The Greensville school board knew that merely abolishing social promotion would not solve the problem of the slow or unwilling learner, and immediately took steps to provide students with the kind of backup programs they would need. These steps represent a significant reorganization of the Greensville schools. They appear to be guided by a sense of age appropriateness, the students' capacity for concentration, and the need for students who are not academically inclined to be prepared for a job when they leave school.

Briefly described, these are the steps taken by Greensville:

- Students were evaluated on standardized test results, report grades, and teacher assessment;
- Students were assigned to one of two kinds of schools--(a) by age alone or (b) by achievement level, if different from age;
- Only three courses were taught per semester, on the grounds that limiting the number of classes makes concentration easier and achievement greater;
- Classes were to last one hour and fifty minutes, twice the usual time, again for reasons of improving concentration;
- Students could be promoted one semester at a time;
- An occupational training program was created for students not doing well academically, which consisted of: (a) job-related skills and (b) instruction in basic skills.

("When Schools . . . , " p. 5; Cunningham and Owens, pp. 27-28)

Greensville made some other provisions to assist students with this new system. Instead of placing retained students in the same classroom the second year, so that they are with students taking that grade level for the first time, retained students are grouped with other over-age students. In assigning students to schools, age is taken into consideration. Younger fifth grade students are grouped in one school, for example; and older fifth grade students attend another school which has mostly sixth and seventh grade students (Cunningham and Owens, pp. 27-28).

For grade repeaters, a record of previously used curriculum materials is maintained. Thus, repeaters are not presented the same curriculum. Half-step promotions are used whenever possible. Enrichment classes in English and mathematics are offered in the junior high. Students unable to move into the regular eighth or ninth grade classes are required to take these enrichment classes.

The occupational training program lasts four years, and the minimum age for beginning the training is 14 years. Those 14-year-olds who are two or more grades behind their age group and who are making unsatisfactory progress are given the opportunity to enroll. The training consists of two parts: (1) job-related skills and (2) instruction in developmental reading, speaking, writing, consumer mathematics, mathematical measurements, and physical education. When they finish the occupational training program, students are given a certificate stating what job-related skills they possess (Cunningham and Owens, p. 28).

One Teacher's Solution

In the Fall of 1978, Janice Maahs Hagen, a fourth grade teacher in Denver, Colorado, was dismayed to discover that a large number of students arriving in her class had skills appreciably below grade level. Seventeen out of a class of 26 ranked below grade level on at least one area of the Comprehensive Test of Basic Skills (CTBS), which is given students both at the beginning and at the end of the school year.

Retention of students was not considered an acceptable alternative in the district at the time, but Hagen decided that she would not promote students who were several grade levels behind at the end of the school year. By carefully planning beforehand exactly what steps to take, Hagen was able to raise the scores of all the children in her class, so that by the end of the year, only 8 were retained. The following describes what Hagen did, indicating the school year timing.

At the Beginning of the Year

- Analyzed results of CTBS test and prepared charts showing results for each child.
- Shared general findings with all parents at parents' night, announcing that at the end of the year, children incapable of completing fourth grade would be considered for retention.
- Established weekly policy of sending home all papers completed by each child, together with a note indicating all papers not completed and a cover sheet listing all papers assigned for the week. Parents were asked to look over each paper, check off the assignments viewed and return sheet on following Monday; students would be permitted to make up any missing work or redo papers with low marks; students would be graded according to ability, but records would be kept of where each child was in relation to grade level.
- Held individual conferences with parents in order to explain exactly what scores meant and how to interpret child's progress during school year.

. Arranged for remedial help for students with problems: individual tutors, diagnostic teachers, or special education teachers.

After First Grading Period

. Issued report cards which contained letter grades, an indication of which subjects students were working up to ability but below grade level in; and attached notes to the cards of those students who seemed in danger of being retained if their work didn't improve substantially.

. Held second official parent conference to discuss report cards.

Throughout First Semester

. Added notes to cover sheets attached to work sent home, singling out certain assignments in order to indicate that student was not doing fourth grade work.

. Established regular, personal contact with parents of failing students.

Throughout Second Semester

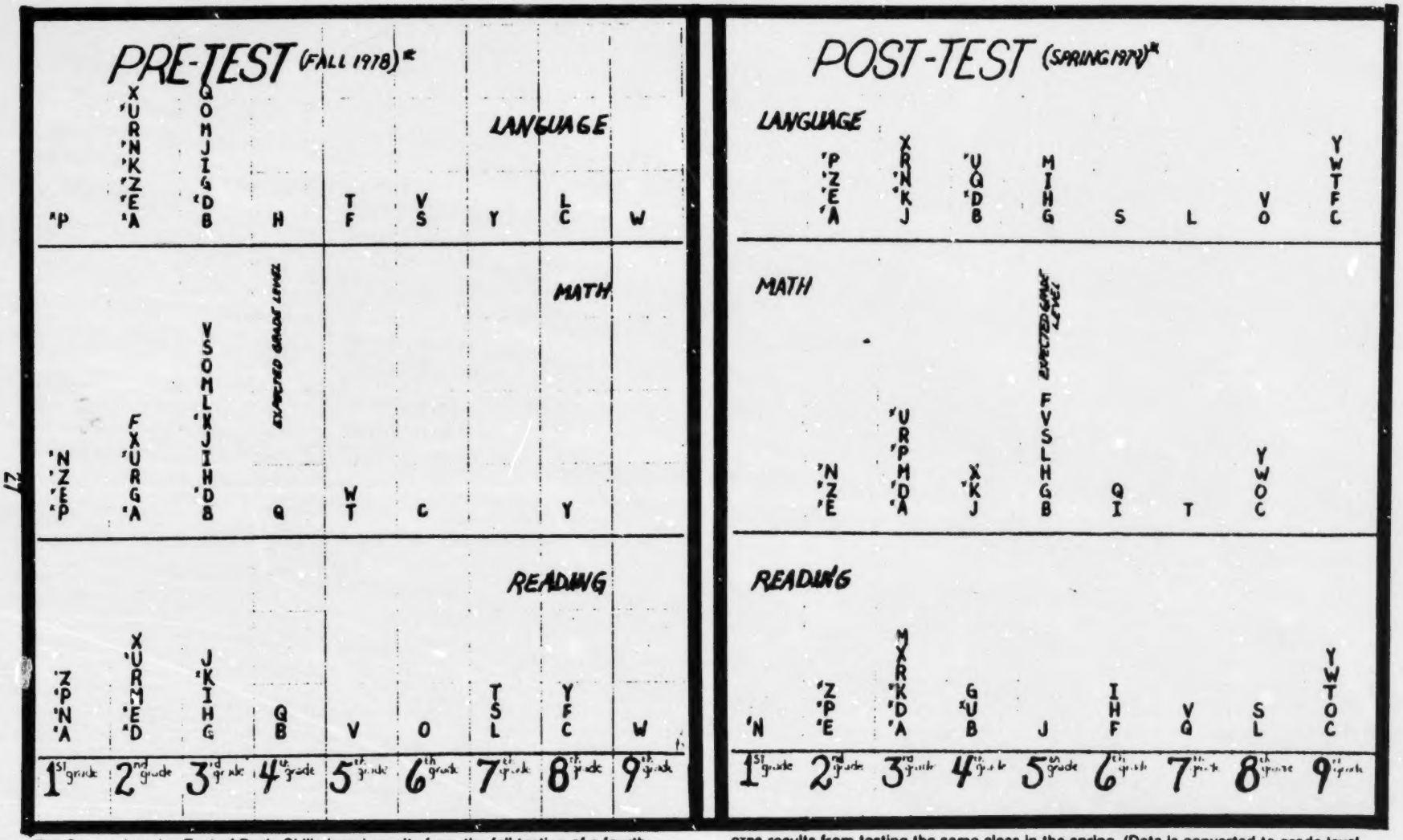
. Made daily homework assignments and gave grade on report cards for "homework completion," to help parents become aware of any difficulties.

. Analyzed results of second CTBS test, comparing them to results of first test.

. Scheduled individual conferences with all parents; and on the basis of report card grades, CTBS results, and judgment, recommended retention of selected students.

(Hagen, pp. 47-48)

Hagen's plan took a great deal of time, but it had dramatic results, as illustrated by the charts reproduced on p. 27.



The Comprehensive Test of Basic Skills (CTBS) results from the fall testing of a fourth-grade class. Letters stand for the same students in both pre- and post-test charts, and asterisks indicate those students ultimately recommended for retention. (Data is converted to grade level equivalency.)

CTBS results from testing the same class in the spring. (Data is converted to grade level equivalency.)

(from Janice Maahs Hagen's "I Kept 8 Students Back . . . and I'm Still Alive to Tell About It." Teacher Vol. 98, No. 1, pp. 48-49.)

At the end of the year, Hagen recommended that 10 of the students be retained. For 4 of these, the parents requested that their children repeat the fourth grade because "they didn't want him or her to struggle so hard only to always be at the bottom of the class" (Hagen, p. 48). Each of these children grew up speaking a language other than English. Three of the others recommended for retention were behind because they consistently failed to complete their assignments.

The parents were asked to sign a statement which was to be placed in the student's cumulative file and noted on the student's report card. The statement explained that it was the recommendation of the school that the child be retained in a particular grade for the school year in question. Parents were asked to indicate if they agreed or disagreed with the retention, and both parents and teachers were required to sign the slip. Parents of all but two of the children agreed to approve retention.

Hagen's humorous title, "I Kept 8 Students Back . . . and I'm Still Alive to Tell About It," suggests the trepidation which many teachers feel in going against the accepted practice of social promotion. Hagen was repeatedly asked to justify her actions by the district's administrative personnel. She now feels there is some short term data which gives such a justification.

The four students who grew up speaking a language other than English became solid, average students who felt successful and confident, reports Hagen (p. 49). The three who failed because they refused to complete their assignments learned that "promotion is based on achievement and mastery of standard grade-level curriculum" and were passed to the fifth grade (Hagen, p. 49), having completed their work the second time around. Of the two that were promoted at their parents' request, one was retained the next year in the fifth grade, at her parents' request; and the other continued to

spend the greater part of the school day with a special education teacher. Hagen reports no adverse affects on self-concept or any negative peer treatment of those students who were retained (Hagen, p. 49).

Hagen's example seems to buttress the argument that a team approach is one effective way to make sure that retention is a positive step. Such a team can consist of the child's teachers, child's parents, and specialists such as the school nurse, psychologist, reading consultant, and counselor. Not only should careful documentation be kept of the child's progress (or lack of it), but a written record should be maintained describing all the steps taken to provide the child with special services. Throughout, it is imperative that the child's parents be kept informed and that a record of parental contact be maintained (Brown, pp. 348-349). A suggested set of action steps, with accompanying time line for such a team approach is reproduced on page 30.

A TEAMWORK APPROACH

Action Steps	Suggested Time of Action—School Month(s)
1. Observe child's progress and document	Months 1 and 2
a. Use school-adopted reporting system b. Use current test interpretation with emphasis on child's performance in each subject area c. Consult with counselor	
2. Determine if child is performing at or below grade level	Months 2-4
3. Inform parents honestly and specifically	Months 2-4
4. Consult with the pupil personnel team and obtain a group assessment of the child's performance	Months 2-4
a. Determine possible causes of difficulty b. Make recommendations about possible solutions c. Determine information to be shared during the conference with parents; identify pupil personnel team members to participate in conference	
5. Conduct parent conference	Months 2-4
a. Inform parents of apparent difficulty b. Seek additional input from parents c. Share with parents the recommendations of the pupil personnel team d. Reconcile any differences between parent vs. school perception of the child's problem	
6. Follow through on recommendations and continue to observe the child's progress	Months 2-6
7. Repeat steps 1-6	Months 2-8
8. Review all information on the child's performance; make recommendation about promotion or retention	Month 8

(from Ernest L. Brown's "Retention: The Team Approach." The Clearing House, Vol. 54, No. 8, p. 349.)

OTHER ISSUES:

COMPETENCY BASED EDUCATION, FINANCIAL CONCERNS, AND LEGAL IMPLICATIONS

The social promotion versus retention controversy does not exist in a void. Swirling around it are such issues as competency based testing (which is usually part of the abolition of social promotion), the high cost of competency based education and of remedial programs, and the problem for schools of the legal suits which often follow. A thorough discussion of these issues is not possible in this paper, but the reader is directed to the references cited for more information.

Competency Based Education

The speed at which some form of minimum competency testing, often mandated by state departments of education or by state legislatures, has been adopted throughout the nation doubtless reflects the widespread concern over educational standards. Arizona began the movement in 1976. By 1980 it had spread to 38 states, representing "a spontaneous national movement without a spokesman or a national organization to promote it" (Ravitch, "The Schools We Deserve," p. 24).

The sudden enthusiasm for competency testing has occurred at a time when serious questions are being raised about the nature of testing itself. Are tests valid? Do they discriminate against minorities? Is it possible to measure certain kinds of skills using tests? Questions pertaining to testing and to other issues receive an in-depth treatment in Walt Haney

and George F. Madaus's "Making Sense of the Competency Testing Movement," which appeared in the Harvard Educational Review (Vol. 48, No. 4, 1978).

Another central area of debate is the definition of competencies. Some states have defined minimum competencies as the basic skills: reading, writing, mathematics. Other states have felt that a more practical, life-skill definition is in order and have included balancing a checkbook, reading want ads, exhibiting citizenship skills, etc. As Haney and Madaus express it,

> A fundamental issue in the competency-testing movement . . . is whether to assess competencies that will be needed later in life or restrict testing to the more traditional school skills, on the assumption that they have some relationship to success beyond school."
>
> (Haney and Madaus, p. 472)

This illustrates that the old debate between the "traditionalists" and the "progressives" is still going on in education today.

During July 1981, the National Institute of Education held a series of hearings in Washington, D.C. on minimum competency tests. Two groups with divergent views toward such tests emerged. Their points of view can be characterized thusly: "Minimum competency tests, on the one hand, could be used to end social promotion and illiteracy among high school graduates, and on the other, to hold back worthy students" ("Battle Begins . . .," p. 3). Interestingly, among those testifying in opposition to competency testing was George Madaus, who is director of Boston College's Center for the Study of Testing, Evaluation and Educational Policy. Others testifying represented research institutes, as well as local school districts.

The views expressed by both groups provide a good overview of the issues which are not yet reconciled. Apparently both groups were able to agree on a few key points: that students should have the opportunity to take

the tests more than once, that students at the bottom of the scale were the real concern, that the tests should not be used to punish teachers, and that test results should not be tied to receipt of government funds ("Battle Begins . . .," p. 3).

From then on, however, the two sides disagreed. Opponents of minimum competency testing charged that

- the tests have a cultural and economic bias which penalizes minority students;
- the tests are not valid as applied throughout the nation;
- the competency movement will have the effect of limiting the curriculum to what will be tested (teaching to the test);
- the competency movement is a part of a government conspiracy to obtain control of the schools;
- the tests damage the self-concepts of students.

("Battle Begins . . .," pp. 3-4)

Supporters of the minimum competency tests held that

- the tests simply prove that minorities have not been receiving high quality education and that they have suffered from years of discrimination;
- the tests help students and teachers focus on where improvement is needed;
- the test results give educators the evidence they need to recommend retention for students who need it;
- the test results are not damaging to students' self-concepts.

("Battle Begins . . .," pp. 3-4)

The concern over the skills of high school graduates and the lack of definition for competencies has recently been addressed by the College Board, an organization which consists of over 2,500 member colleges and universities and which yearly administers the SAT to graduating seniors. On September 24, 1981, the College Board announced that it had completed development of Project Equality, whose concern is to raise educational standards without leaving minority students behind (Reaves, Austin American-Statesman, September 25, 1981). Project Equality, which is being pilot tested by San Antonio, Texas schools, establishes a new set of standards to be met by college-bound high school students.

The two-part standard consists of a set of six areas of basic academic competencies, which are to be displayed within six basic curriculum areas. The College Board defines the academic competency areas as reading, writing, listening and speaking, mathematics, reasoning, and studying, with specific skills to be mastered in each area. The six basic curriculum areas in which these skills are to be displayed are defined as English, mathematics, history or social studies, natural science, foreign or secondary language, and visual and performing arts.

PROJECT EQUALITY'S TWO-PART STANDARD

Competency Areas	Curriculum Areas
. Reading	. English
. Writing	. Mathematics
. Listening & Speaking	. History or Social Studies
. Mathematics	. Natural Sciences
. Reasoning	. Foreign or Secondary Language
. Studying	. Visual & Performing Arts

The College Board hopes to encourage its member colleges and universities to adopt the set of competency and curriculum standards,

at least as an expression of preference, if not as requirements for admission to college.

Financial Considerations

When social promotion is abolished, some form of competency testing is often instituted, along with remedial programs for students who are retained or who are in danger of being retained. At both the state and the district level, the costs of competency based programs and attendant remedial programs can be staggering. Legislatures, who in many cases mandate co.., tency testing programs, often fail to address the costs involved in test development and security. Many even ignore the remedial programs which must follow (Pipho, p. 586).

Costs can vary widely, depending upon whether or not the school district chooses to develop its own tests or uses commercially developed ones, and what kinds of remedial programs are elected. If test development and remedial programs are included, along with possible legal expenses, costs could range from $15.00 to $20.00 per pupil (Haney and Madaus, p. 420). An area often overlooked in assessing costs is obtaining community support, critical for any new testing and promotions policy. Parents will often favor abolishing social promotion until their child doesn't pass. The community must be prepared beforehand by receiving an explanation of the purposes and outcomes of any new program (Thompson, p. 3).

Costs to the school districts, then, can occur in four areas:

- test development
- test administration
- remedial programs
- community support

1. Test Development

Locally developed tests are very expensive. While standardized tests can reduce costs, when they are used as the basis for passing or failing a child, lawsuits based on the alleged discriminatory nature of such tests can result. Such lawsuits, of course, are very expensive.

It is estimated that the cost to a school system for "developing one test, conducting pilot studies, making revisions, and final printing will run from $25 to $210 per test item" (Thompson, p. 31). The total cost to develop one test could very well run from $15,000 to $63,000.

2. Test Administration

When the state takes care of the printing, distribution, scoring, and reporting the results of the competency tests, there is little cost to local schools except for administering the tests. When schools have to score their own tests and screen the results, however, costs increase substantially. Simply administering the tests and coordinating all this activity at the school level, which may require one coordinator per school, is not inexpensive, however (Thompson, p. 31).

3. Remediation

The most expensive part of abolishing social promotion and instituting minimum competency testing are the remediation programs that follow. These usually have to be borne by the local school systems. Costs for remedial programs will depend upon what the standards are for failure or promotion, the number of retentions that result, and the amount of time the school system can afford to take to bring failing students up to standards. In

Washington State, for example, it is estimated to have cost from $86 to $94 million for remedial work in reading and mathematics (Thomas, p. 31).

4. Community Support

No figures were cited in the literature review for this paper on obtaining and then keeping the support of the community. The task obviously requires a lot of time, effort, and expertise, as well as increased costs.

Legal Implications

Neither a policy of social promotion nor a minimum competency testing program with retention provisions escapes litigation. Both are accused of placing an unfair burden on students, when it may be the educational system which is at fault.

Schools are being sued when they award a high school diploma to someone who has not achieved a certain level of proficiency in reading, writing, and arithmetic. This happened in the case of "Peter W. Doe," whose mother brought suit against the California School System because her son was graduated with severe reading problems that left him unqualified for any but the most unskilled jobs (Cunningham and Owens, p. 25). Schools are also being sued when they deny a diploma to someone on the grounds of a test score, as in the case of Debra P. v. Turlington, which contested the Flordia statute requiring students to pass a minimum competency test in order to graduate from high school.

A definite trend—how the courts are likely to rule on such cases—has not yet been established. However, in 1981, the Maryland Court of Special Appeals rejected the lawsuit of a fourth grader who, it was

claimed, had been wrongly retained in the second grade because his teachers failed to teach him properly and should have known he was not learning. The court maintained that no standards exist to measure a teacher's duty to a student and reiterated the theme of judicial restraint, cautioning against "trying to determine education quality in a courtroom" (Splitt, p. 15).

Lawyers representing students, or parents of students, who have failed to pass a test, question the legality of many of the minimum competency testing programs on the grounds that they are designed and implemented in an inequitable manner. Programs are criticized for inadequate phase-in periods, inadequate match between test and instruction, and racial discrimination (McClung, p. 397).

Inadequate phase-in periods which may violate due process include instances where students are informed that they are expected to pass a test only one or two years before graduation. This means that "a student will have spent his first 10 or 11 years in the school system without notice or knowledge that passing a competency test would be a condition for acquiring the diploma" (McClung, p. 397). The student's progress would have been approved by the district since it promoted him or her every year. Adequate knowledge of competency testing probably would have changed the behavior of both the teachers and the students, it is claimed.

When the instruction the pupil receives and the competency test do not match, the validity of the test itself is called into question. A comparison of test objectives with curricular objectives is necessary. Instructional validity is another issue: the stated objectives of the school should have been taught in the classroom (McClung, p. 397). Because a disproportionate percentage of minority students cannot meet

minimum competency standards, tests have been questioned on racial and socio-economic bases as well.

In May 1981, considering Debra P. v. Turlington, the U.S. Fifth Circuit Court of Appeals ruled that "when students are required to pass a test to receive their high school diplomas, the test must be fair; i.e., it must cover materials that have actually been taught. If a test is not fair, using it to determine who graduates is a violation of the equal protection and the due process clauses of the U.S. Constitution, the Court said" (Popham and Lindheim, p. 18).

Tests that go beyond the basic skills and require students to demonstrate mastery of certain "life skills" such as balancing a checkbook or reading want ads or being a good citizen can be questioned on the grounds that they are not able to actually measure the knowledge and skills necessary to be an effective member of society and that they assume values and background which discriminate on the basis of race or culture or infringe upon individual choice (McClung, p. 398).

Thus the problems inherent in specifying the life-skill competencies, setting minimums for such competencies, and then testing the degree to which individuals possess them is a formidable task (Haney and Madaus, p. 472). For many of the competencies there are no good measuring instruments. For others, the validity and reliability may not be sufficient to prove adequate grounds for withholding a high school diploma.

SUMMARY

Social promotion began to be widely adopted in this country during the 1950s, apparently reaching its zenith in the 1970s. The practice grew out of the practical emphasis placed on education in the U.S. In the early part of the 20th century, as free public education was extended into secondary grades, it became important to provide an education which would benefit the average and below average student as well as students who would be continuing their education into college. As a consequence, the curriculum was expanded and the policy of social promotion was begun.

As the 1980s get under way, social promotion is being seriously questioned. We are discovering that most research studies--including those that are against social promotion as well as those that favor it--have been poorly designed and provide mixed or inconclusive results. Educators in the past were setting policy without the research to back it up. Among the findings of recent students are that retention appears to have a beneficial effect on students in the elementary grades and that the self-concept of promoted and retained students are virtually the same, again in the elementary grades.

Abolishing social promotion and instituting some form of retention based on competency testing is being tried in schools throughout the country. Competency testing and the remedial programs which result are very costly, and often controversial, but schools appear to feel that they are serving students better through such policies.

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The Regional Exchange at Southwest Educational Development Labortory (SEDL/RX) is one of eight regional exchanges and four central support services which comprise the Research & Development Exchange (RDx) supported by the National Institute of Education. The RDx, begun in October 1976, has four broad goals:

- To promote coordination among dissemination and school improvement programs.
- To promote the use of R&D outcomes that support dissemination and school improvement efforts.
- To provide information, technical assistance, and/or training which support dissemination and school improvement efforts.
- To increase shared understanding and use of information about client needs to order to influence R&D outcomes.

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- AEL/RX Appalachia Educational Laboratory, Charleston WV
- CEMREL/RX CEMREL, Inc., St. Louis MO
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- NE/RX Northeast Regional Exchange, Merimack Education Center, Chelmsford MA
- NWREL/RX Northwest Regional Educational Laboratory, Portland OR
- RBS/RX Research for Better Schools, Philadelphia PA
- SEDL/RX Southwest Educational Development Laboratory, Austin TX
- SWRL/RX Southwest Regional Laboratory, Los Alamitos CA

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- RRS Research & Referral Service, Ohio State University, Columbus OH
- SSS System Support Service, Far West Laboratory, San Francisco CA
- DSS Dissemination Support Service, Northwest Regional Laboratory

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